



Three-Year Business Plan Objective Summary

FY 2008-09 Objectives Due December 31, 2008

Objective	Status	Owner
2.6 – By December 31, 2008, establish a comprehensive enterprise wide diversity awareness baseline.	●	CDOP
2.8 – By December 31, 2008, develop and implement a comprehensive diversity strategy that is integral to our external programs and that seeks to take advantage of all the skills, talents, and opportunities within the marketplace.	●	CDOP
3.2 – By December 31, 2008, all managers will know of and have the opportunity to participate in the Succession Planning Framework to sustain current leadership, develop new leaders, and maintain the intellectual and human capital at CalPERS.	●	HRSD
5.1 – By December 31, 2008, establish a Board approved methodology for our employers, members and their representatives, and stakeholders to use when designing and selecting benefits.	●	AESB
6.4 – By December 31, 2008, establish target per unit pension transaction costs.	●	AESB MBSB
9.1 – By December 31, 2008, identify and implement new investment strategies and opportunities to enhance long-term, sustainable returns and provide the Investment Committee with a report documenting their value added and cost effectiveness.	●	INVO
9.2 – By December 31, 2008, execute the Board approved strategic initiatives to improve transparency, shareowner rights, and board accountability, including shareowner access to proxy, executive compensation practices, environmental disclosure, and majority vote standards.	●	INVO
9.3 – By December 31, 2008, develop and implement a comprehensive diversity strategy that is integral to our investment program and that seeks to take advantage of all the skills, talents, and opportunities within the marketplace.	●	INVO
10.2 – Annually maintain the number of contracting agencies at or above 98 percent of 2006 levels.	●	HBB
12.1 – By December 31, 2008, consistent with the CalPERS “Partnership for Change,” maintain publicly available standardized hospital quality and cost efficiency data to help members make informed health care decisions.	●	HBB
12.2 – By December 31, 2008, increase the number of purchaser covered lives endorsing the CalPERS “Partnership for Change” to 6 million.	●	HBB



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FY 2008-09 Objectives Due July 1, 2009

Objective	Status	Owner
6.5 – By July 1, 2009, increase the number of members using CalPERS self-service tools by 50 percent over the 2006-07 baseline.	●	PAOF
7.1 – By July 1, 2009, increase the number of members using retirement and financial planning tools offered by CalPERS to make informed decisions regarding their retirement by 50 percent over the 2005-06 baseline.	●	MBSB
11.4 – By July 1, 2009, all CalPERS contracting health plans will implement an incentive program to encourage members to make healthier lifestyle choices.	●	HBB



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FY 2009-10 Objectives Due December 31, 2009

Objective	Status	Owner
2.9 – By December 31, 2009, sustain the current level of overall employee satisfaction achieved in the 2007 employee opinion survey.	●	SMSD
4.1 – By December 31, 2009, 75 percent of the members and stakeholders surveyed will rate the value of CalPERS as good to excellent.	●	PAOF GOVA
5.2 – By December 31, 2009, develop a plan for Board approval to administer product and service offerings for stakeholders.	●	INVO MBSB
10.1 – By December 31, 2009, increase the number of contracting agency new total covered lives in CalPERS Health Benefits Program by 8 percent over the 2006 baseline.	●	HBB
10.2 – Annually maintain the number of contracting agencies at or above 98 percent of 2006 levels.	●	HBB
10.3 – By December 31, 2009, maintain an average annual Health Maintenance Organization (HMO) cost trend lower than comparable large health care purchasers.	●	HBB
10.4 – By December 31, 2009, 90 percent of members surveyed rate the value of CalPERS Health Benefits Program in the survey's top two ratings.	●	HBB
11.2 – By December 31, 2009, increase the number of surveyed members making a healthy lifestyle change by 5 percent over the 2006 survey baseline.	●	HBB
11.3 – By December 31, 2009, 20 percent of surveyed members with chronic diseases successfully self-manage their disease.	●	HBB

FY 2009-10 Objectives Due July 1, 2010

Objective	Status	Owner
1.6 – By July 1, 2010, implement applicable recommendations and new legislation resulting from the Post-Employment Benefit Commission's findings.	●	AESB



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FY 2010-11 Objectives Due December 31, 2010

Objective	Status	Owner
2.7 – By December 31, 2010, develop and implement a comprehensive enterprise wide diversity strategy to increase employee awareness by 5 percent over baseline established in 2008.	●	CDOP
3.3 – By December 31, 2010, integrate a proven change management methodology into the CalPERS culture for future projects and initiatives.	●	ETM SMSD
4.2 – By December 31, 2010, fully implement a statewide education and outreach program targeted to policymakers and public officials to enhance and strengthen the understanding of CalPERS value in California.	●	PAOF GOVA
10.2 – Annually maintain the number of contracting agencies at or above 98 percent of 2006 levels.	●	HBB
10.5 – By December 31, 2010, 90 percent of employers surveyed rate the value of CalPERS Health Benefits Program in the survey's top two ratings.	●	HBB

FY 2010-11 Objectives Due July 1, 2011

Objective	Status	Owner
1.7 – By July 1, 2011, establish the infrastructure needed to administer a comprehensive other post-employment benefit obligation program, including needed legislation, program policies, investment vehicles, and administrative capacity.	●	AESB
6.6 – By July 1, 2011, refine target customer service and satisfaction levels for members and employers.	●	AESB MBSB
6.7 – By July 1, 2011, refine target per unit pension transaction costs.	●	AESB MBSB
8.2 – By July 1, 2011, establish a Board approved asset allocation policy and actuarial methodologies that, in light of the primary goal to achieve fully-funded status, strikes a balance between expected average annual employer contribution rates and stable expected average annual changes in employer contribution rates.	●	INVO



Three-Year Business Plan Objective Summary

FY 2011-12 Objectives Due December 31, 2011

Objective	Status	Owner
<i>10.2 – Annually maintain the number of contracting agencies at or above 98 percent of 2006 levels.</i>	●	HBB
<i>11.5 – By December 31, 2011, increase the number of employers who proactively promote employee participation in healthy lifestyle incentive programs by 10 percent over the 2008 survey baseline.</i>	●	HBB